



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 04, 2025



Indian equity benchmarks recovered from intraday losses on Friday, with both the Nifty and Sensex closing near the day's highs, supported by gains in IT and banking stocks. After making a slightly positive start, indices traded near the neutral lines during the morning session, as investors were cautious ahead of the upcoming deadline to impose tariffs by US President Donald Trump. In the afternoon, markets turned negative but managed to recover and end day with decent gain.

Some of the important factors in today's trade:

India's economy likely to grow 6.4-6.7% in FY26: Traders took some support with the newly appointed Confederation of Indian Industry (CII) President Rajiv Memani's statement that the country's economy is likely to grow 6.4-6.7 per cent during the current financial year (FY26) driven by strong domestic demand, even as geopolitical uncertainty poses downside risks.

China mineral curbs a wake-up call for India: Traders took a note of think tank GTRI stated that China's export curbs on critical minerals crucial for India's electronics sectors are no longer mere warnings but a wake-up call for New Delhi, underscoring the need for urgent measures like reverse-engineering of low- to mid-tech imports to cut overreliance on Beijing.

Foreign fund outflow: Traders overlooked the Foreign institutional investors (FIIs) stayed net sellers in the cash segment for the fourth session in a row. On July 3 alone, they sold Indian equities worth Rs 13,154.15 crore, while their purchases stood at Rs 11,672.96 crore, resulting in a net outflow of Rs 1,481 crore.

Global front: European markets were trading in red, as regional data disappointed, and uncertainty prevailed over U.S. trade deals. Asian markets ended mostly in red ahead of President Donald Trump's July 9 deadline to impose reciprocal tariffs. U.S. President Donald Trump warned countries to strike deals before the deadline or face tariffs.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83432.89	193.42	0.23
NIFTY	25461.00	55.70	0.22
MIDCAP	46814.34	106.01	0.23
SMLCAP	54830.34	92.17	0.17
BSEFMC	20175.83	59.02	0.29
HEALTHCARE	44895.66	287.55	0.64
AUTO	53618.71	-83.99	-0.16
POWER	6847.59	10.54	0.15
REALTY	7540.28	64.90	0.87
BSE IT	38317.07	253.23	0.67
BANKEX	63661.83	277.16	0.44
OIL GAS	28356.53	352.75	1.26
METAL	31854.71	-146.72	-0.46
INDIA VIX	12.31	-0.08	-0.65

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1576	1345	99
BSE	2202	1845	142

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6224	7335	(15)
NSE CASH	88821	96739	(8)
NSE F&O	127576	161113	(21)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.92	3.69	1.28
SENSEX	23.89	4.44	1.16

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	9948	11067	(1119)
FII	7277	7858	(581)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	2056.40	2803.85	(747)
Ind. Options	785237.82	786618.99	(1381)
Stk. Futures	13835.49	14257.16	(422)
Stk. Options	14148.53	14303.46	(155)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.80	0.84
BANK NIFTY	1.01	0.98

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	96.99	97.18	-0.20

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.290	6.295	0.16
USA	4.328	4.340	-0.28

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3336.94	6.06	0.18
Silver	36.89	0.11	0.29
Crude-Oil	66.40	-0.76	-1.13
Brent-Crude	68.47	-0.39	-0.57



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
29 JULY-25 USD-INR	85.47	0.05	0.06
29 JULY-25 EUR-INR	100.83	-0.08	-0.08
29 JULY-25 GBP-INR	116.81	0.01	0.01
29 JULY-25 JPY- INR	59.79	-0.05	-0.07

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25461	25282	25372	25421	25510	25560
SENSEX	83433	82847	83140	83309	83602	83771
NIFTY FUTURES	25540	25354	25447	25503	25596	25652
BANK NIFTY	57032	56459	56745	56910	57197	57362
CNX IT	39167	38640	38903	39048	39311	39455
CNX MIDCAP	59678	59092	59385	59642	59935	60192
CNX SMALLCAP	19033	18870	18952	19015	19097	19160
INDIA VIX	12.32	11.96	12.14	12.42	12.60	12.88

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Buy	Buy	Buy
SENSEX	Buy	Buy	Buy
NIFTY FUTURES	Buy	Buy	Buy
BANK NIFTY	Buy	Buy	Buy
CNX IT	Buy	Neutral	Neutral
CNX MIDCAP	Buy	Buy	Buy
CNX SMALLCAP	Buy	Buy	Buy
INDIA VIX	Sell	Sell	Neutral

SECURITIES BAN IN F&O TRADES FOR 07-07-2025
RBLBANK

# TECHNICAL VIEWS



## NIFTY

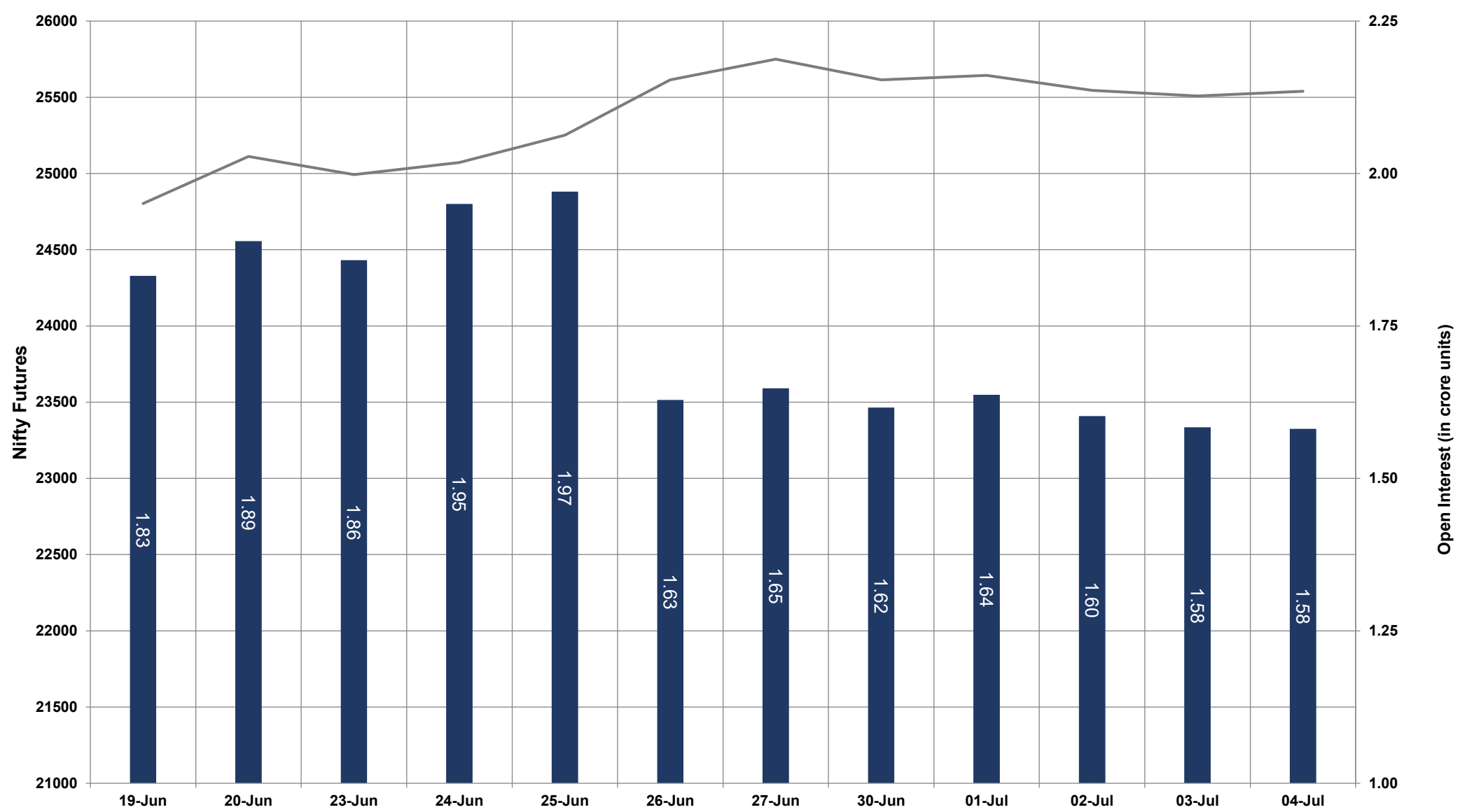


- Nifty Cash = **25461.00 (0.22%)**
- Resistance levels = **25545** and **25610**
- Support levels = **25310** and **25240**

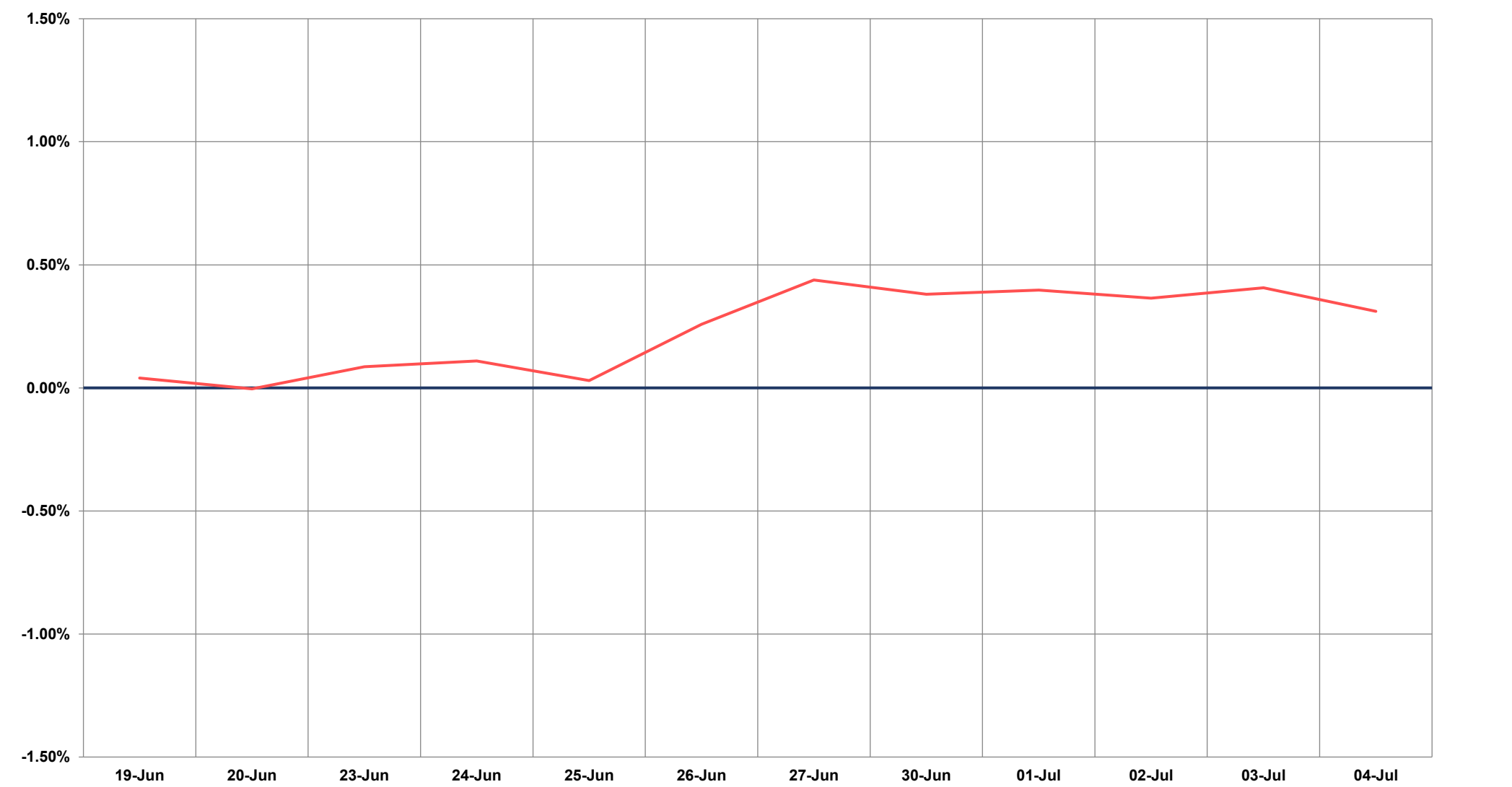
# TECHNICAL VIEWS



## NIFTY FUTURES



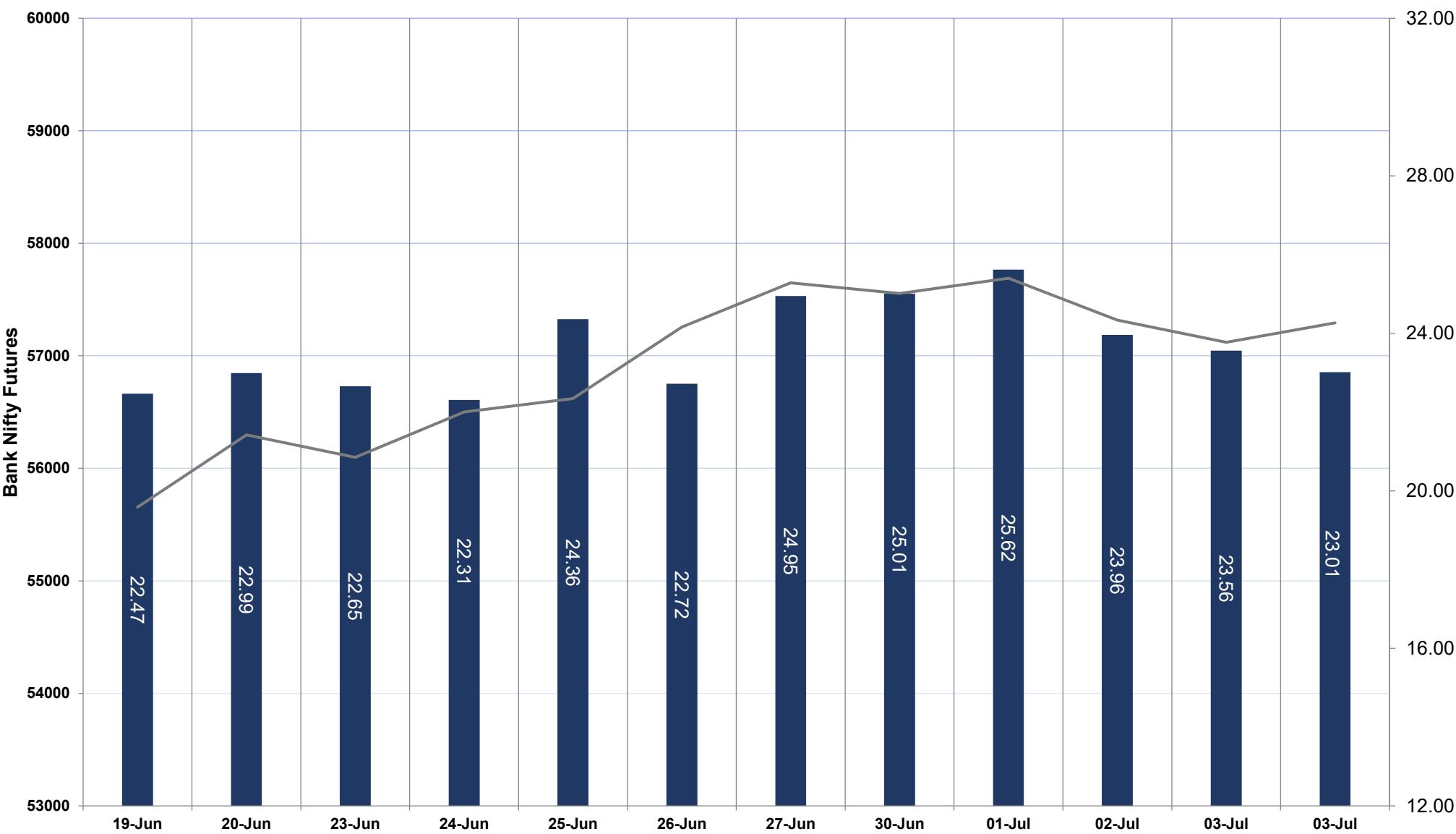
## SPREAD: FUTURE & SPOT



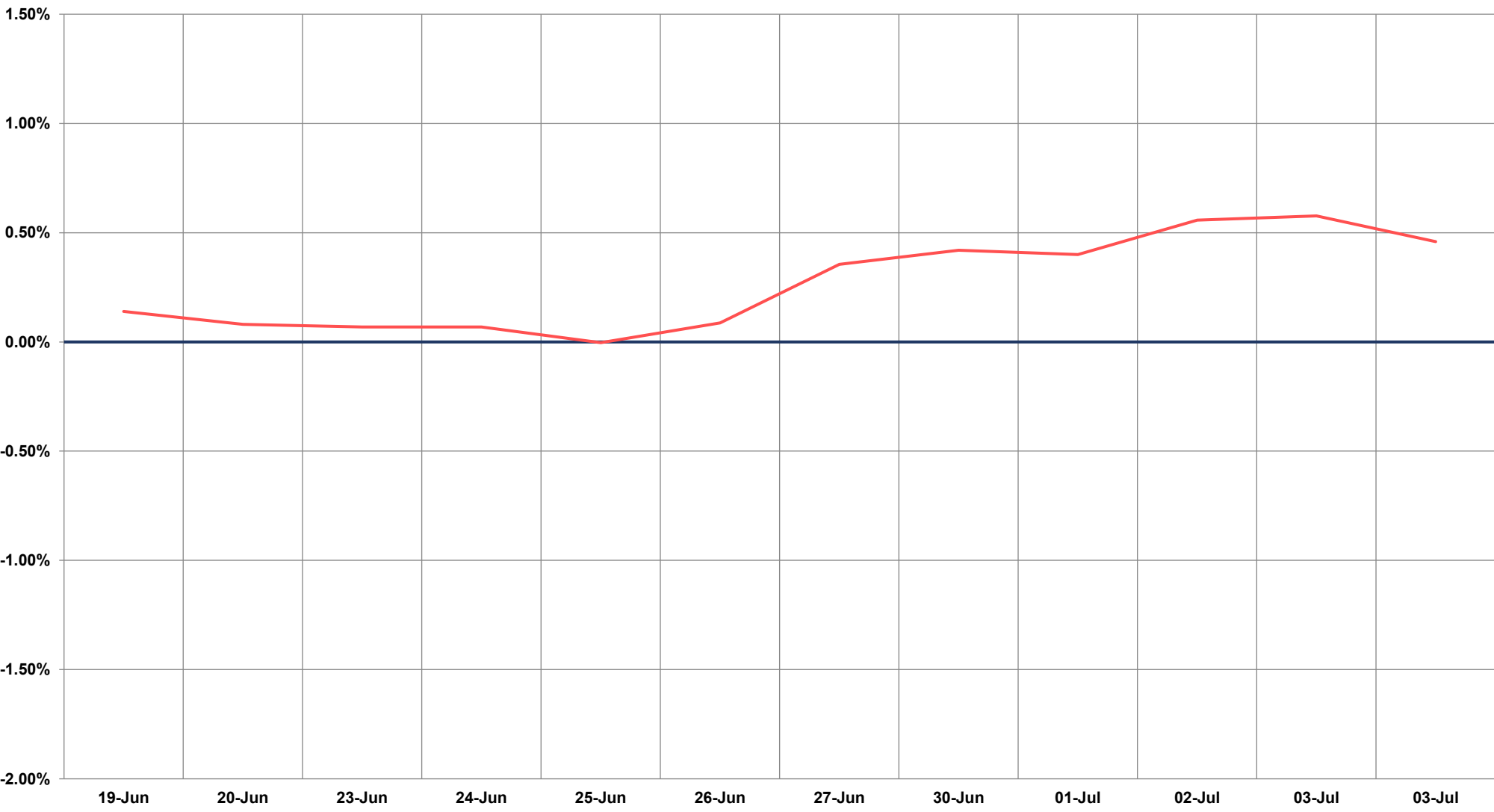
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

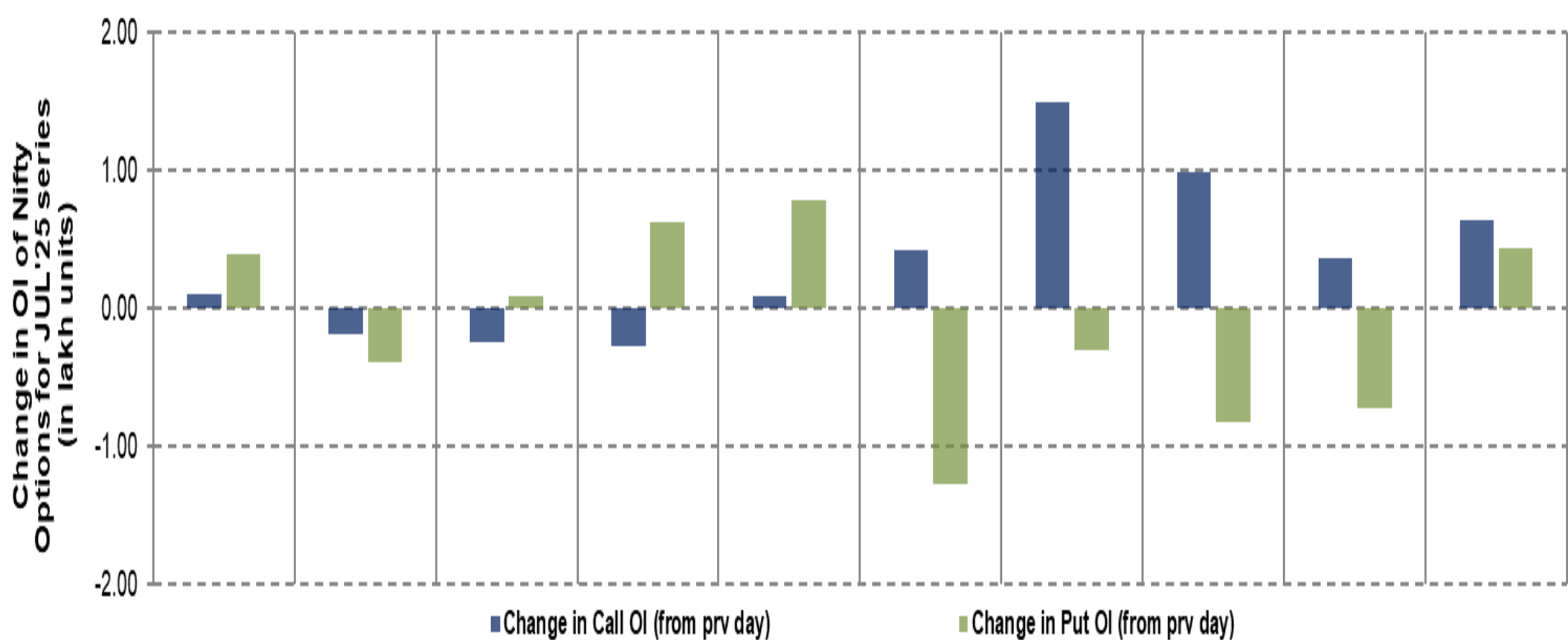
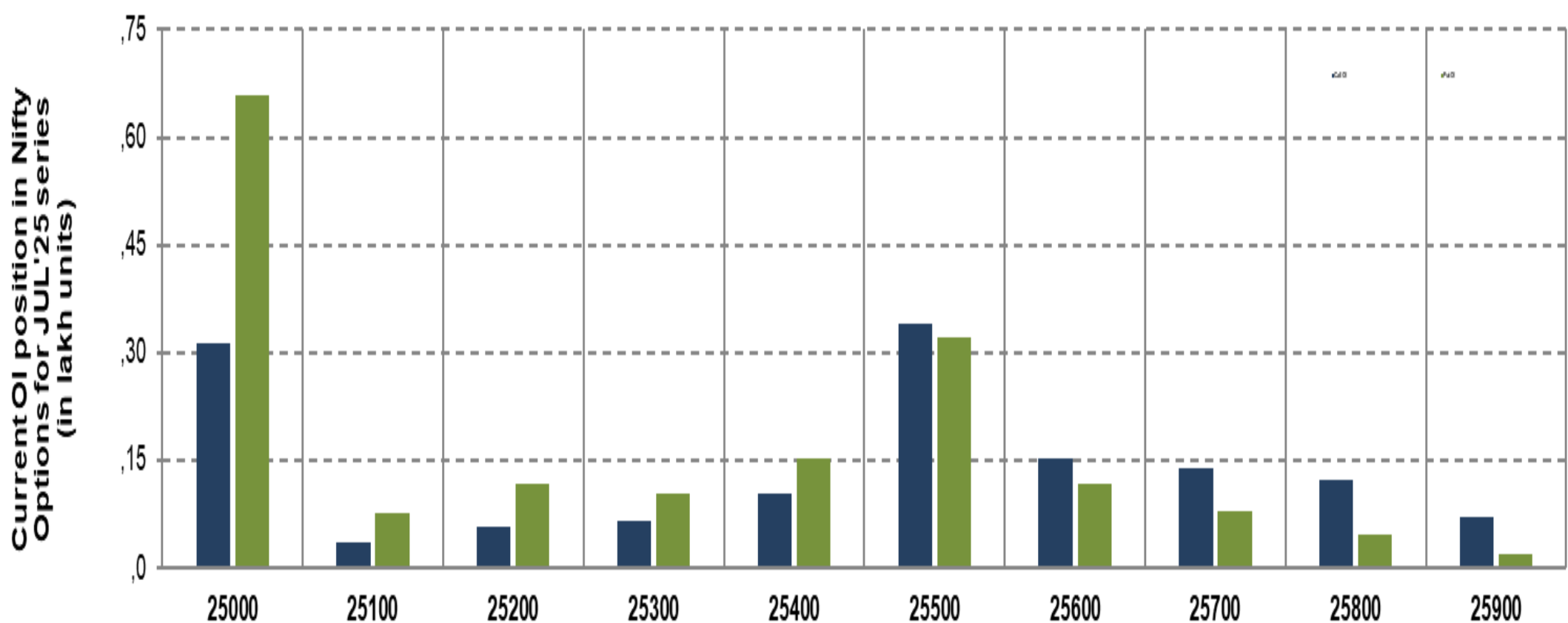




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.14 million in Open Interests is **Strike Price of 25600**
- **Most Active Nifty Put** with a subtraction of 0.13 millions in Open Interests is **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 3.39 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.57 millions for puts at **Strike Price of 25000**

# Disclaimer



The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.